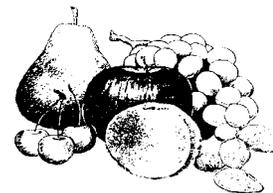


California Fruit & Nut Review



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APRIL CROP COMMENTS

Cultivation, irrigation, pest control treatments and fruit thinning continued in orchards and vineyards across the State. Grapevines were in the shoot elongation stage by the end of April. Table grape vineyards were thinned and suckered to improve fruit quality. Early table grape varieties began to show the first signs of bloom by month's end. Disease, weed, and insect control work continued in raisin, wine, and table grape vineyards. Irrigation was widespread as rapid growth increased water requirements. Warm temperatures during April promoted maturity and size in early cherry varieties. As a result, the early variety cherry harvest commenced with Brooks, Garnet and Tulare the primary varieties picked and packed. The early variety Freestone peach harvest began during the first week of April in the Coachella Valley and around the middle of April in the Central Valley. Picking of Castlebrite apricots was also underway by month's end. Pomegranate orchards were blooming in several districts. Bloom on kiwifruit vines was nearly complete by the end of April, but growers continued to thin canes. Picking of blueberries began in the east side districts of Fresno County. Strawberry harvesting continued with brisk sales at roadside stands. Immature plums were picked as a specialty export crop. High temperatures during bloom resulted in poor pollination in dried plum orchards. Quince, apples, and pears were sprayed to control Codling Moth. Olives and avocados had developed bloom buds by the end of April. Cultivation and irrigation continued in almond, walnut, pistachio, and pecan orchards. Steady nut development continued in almond and walnut orchards. Blight spraying and fungicide applications continued in walnut orchards. Citrus bloom was in full-swing by the middle of April, and neared complete petal fall stage by month's

end. Fertilizer applications, irrigation, treatments to control insect pests, hedging, and topping were underway in a number of citrus orchards. Navel harvest was approximately 90 percent complete by month's end. Navel orange packouts decreased due to granulation, puff, rough rind texture, and oversized fruits. Picking continued in a few Valencia orange and Mandarin orchards. Lemon harvesting was steady throughout the month. Star Ruby variety grapefruit were packed in the desert and in some areas of Riverside County.

ALMOND PRODUCTION

The initial forecast for the 2004 California almond production is 1,100 million pounds. This is up 6 percent from last year's revised production of 1,040 million pounds. Estimated bearing acreage for 2004 is 550 thousand. This forecast is based on calls made April 22 - May 3 to a sample of almond growers. Of the 420 growers sampled, 281 reports were usable. Acreage from the usable reports accounted for 18 percent of the total bearing acreage.

The almond bloom started in mid-February. Growers thought heavy rains and wind during the bloom may have affected bee activity and pollination. However, the bloom was very intense with an excellent overlap of blooming varieties. Bloom was strong and stayed on the trees for much longer than normal, which may have been due to the cool, damp weather. Even the strong winds and heavy rain in late February did not appear to affect the set. Some trees were reported blown over by high winds, but total damage was minimal. Very warm weather in early March advanced crop development, which is currently at least two weeks ahead of normal. By early May, the kernels had already hardened in some varieties, which is much earlier than normal. The kernel size appears to be about normal. The younger trees seem to have a very good set. Growers indicated that the Nonpareil crop may be a little below last year, but the other varieties have a very heavy set. Overall, the crop appears to be fairly uniform throughout the State and the growers expect to have a good crop.

FRUIT AND NUT STATISTICS AT A GLANCE

Crop	Bearing Acreage		Yield Per Acre		Estimated Production		Production Percent Change	Next Crop Update
	2003	2004	2003	2004	2003	2004		
NUT CROPS	Acres		Pounds		1,000 Pounds			
Almonds (Shelled) ^{1/}	550,000	550,000	1,890	2,000	1,040,000	1,100,000	6	June 30, 2004
Pecans	2,600	---	1,380	---	3,600	---		October 12, 2004
Pistachio (In-Shell)	---	---	---	---	88,000	---		
Marketable In-Shell	---	---	---	---	28,000	---		
Shelling Stock	---	---	---	---	---	---		
Total	88,000	---	1,320	---	116,000	---		January 2005
Walnuts (In-Shell) ^{2/}	205,000	---	1.59	---	325.0	---		September 2, 2004
FRUIT CROPS								
Apples	26,000	---	8.85	---	230.0	---		August 12, 2004
Apricots	16,500	---	5.61	---	92.5	---		June 11, 2004
Cherries	27,000	---	2.30	---	62.0	---		June 11, 2004
Grapes, Raisin ^{3/}	255,000	---	8.24	---	2,100.0	---		July 12, 2004
Grapes, Table	89,000	---	7.75	---	690.0	---		July 12, 2004
Grapes, Wine	479,000	---	6.05	---	2,900.0	---		July 12, 2004
Grapes, All ^{3/}	823,000	---	6.91	---	5,690.0	---		July 12, 2004
Olives	36,000	---	3.28	---	118.0	---		August 12, 2004
Peaches, Clingstone	31,000	32,500	17.30	17.70	536.0	575.0	7	June 11, 2004
Peaches, Freestone	39,000	37,000	10.20	11.10	399.0	410.0	3	June 11, 2004
Pears, Bartlett	12,500	---	16.10	---	201.0	---		June 11, 2004
Pears, Other	4,300	---	6.98	---	30.0	---		August 12, 2004
Prunes (Dried Weight) ^{4/}	72,000	---	2.44	---	176.0	---		June 4, 2004
BERRIES			Cwt.		1,000 Cwt.			
Strawberries	29,600	33,200	620	570	18,352	18,924	3	July 9, 2004
CITRUS CROPS ^{5/}	2002-03	2003-04	2002-03	2003-04	2002-03	2003-04		
			Cartons		1,000 Cartons			
Grapefruit	13,000	12,500	862	864	11,200	10,800	-4	July 12, 2004
Lemons	49,000	49,000	980	939	48,000	46,000	-4	July 12, 2004
Oranges, Navel	127,500	128,000	643	609	82,000	78,000	-5	July 12, 2004
Oranges, Valencia	64,000	52,000	641	577	41,000	30,000	-27	July 12, 2004
Tangerines ^{6/}	9,200	9,500	543	505	5,000	4,800	-4	July 12, 2004

^{1/} Almond Objective Measurement Report will be released June 30, 2004 at 12:00 p.m.

^{2/} Walnut Objective Measurement Report will be released September 2, 2004 at 12:00 p.m.

^{3/} The Raisin Industry Diversion Program (RID) had zero acres for 2003.

^{4/} Prune Forecast Report will be released June 4, 2004 at 12:00 p.m.

^{5/} Grapefruit -- 33.5 lbs. per carton; Lemons -- 38.0 lbs. per carton; Oranges -- 37.5 lbs. per carton; Tangerines -- 37.5 lbs. per carton.

^{6/} Includes tangelos, tangerines and tangors.

PEACHES: The 2004 California Freestone Peach crop forecast is 820 million pounds, up 3 percent from the 2003 crop. Bearing acreage is estimated at 37,000 acres, resulting in a yield of 22,200 pounds per acre. Freestone peach bloom was delayed this year, but a warm and dry spring shortened the bloom period making up for the delayed start. Some middle-to-late season varieties had problems with incomplete pollination. Also, high temperatures experienced during late summer of last year put stress on the trees, resulting in some fruit doubles this season. The set in the other varieties, however, will most likely make up for the decrease in production of the middle to late season varieties. Harvest of Freestone peaches began during the first week of April in the Coachella Valley and around the middle of April in the Central Valley. The 2004 California Clingstone peach crop forecast is 1,150 million pounds, up 7 percent from the 2003 crop. Bearing acreage is estimated at 32,500 acres resulting in a yield of 35,400 pounds per acre. California experienced an adequate number of winter chilling hours, thus benefitting the Clingstone crop. Overall, bloom was reported to be good on all varieties. The crop is reported to be in excellent condition with good size and uniform growth. The peach trees are much further along than last year due to record-setting warm temperatures experienced this spring.

FLORIDA CITRUS: During the month of April, weather in Florida's citrus areas was mostly dry with cool nighttime temperatures and moderate to warm days. Several cold fronts passed through the State, bringing overnight temperatures in the 40's in some northern locations on several mornings. Very few cloudy days allowed daytime highs to reach into the upper 80's on many days. The cold fronts brought very little rainfall; virtually no rain was reported during the first and third weeks of the month. The last week in April, however, brought up to five inches of rain in some interior areas and varying amounts in coastal areas. Citrus trees in all areas are in excellent condition following the favorable weather of the past several months. The bloom period was completed in mid-March.

Early mid-season harvest is complete. Valencia oranges were at peak weekly harvest levels with good demand reported for fresh shipments. Weekly harvest reached more than 8.00 million boxes. Grapefruit harvest for fresh shipments began to decrease during the last of the month with harvest for processing also beginning to decline. Honey tangerine and Temple harvests are almost complete.

CITRUS FRUIT PRODUCTION

Crop and State	2001-02	2002-03	Forecast 2003-04
	1,000 Cartons		
ORANGES: 1/			
California, All 2/	103,000	123,000	108,000
Navel & Misc. 2/	64,000	82,000	78,000
Valencia 2/	39,000	41,000	30,000
Florida	460,000	406,000	490,000
Texas 2/	3,480	3,140	3,360
Arizona 2/	1,040	940	1,080
UNITED STATES TOTAL	567,520	533,080	602,440
GRAPEFRUIT: 3/			
California 2/	11,800	11,200	10,800
Florida	93,400	77,400	81,000
Texas 2/	11,800	11,300	10,800
Arizona 2/	320	260	200
UNITED STATES TOTAL	117,320	100,160	102,800
LEMONS: 2/ 4/			
California	36,600	48,000	46,000
Arizona	5,600	6,000	6,000
UNITED STATES TOTAL	42,200	54,000	52,000
TANGERINES: 5/			
California 2/ 6/	4,400	5,000	4,800
Florida 7/	13,200	11,000	13,000
Arizona 2/ 6/	1,240	860	1,200
UNITED STATES TOTAL	18,840	16,860	19,000

1/ ORANGES: California and Arizona, 1 carton = 37.5 lbs.;

Florida, 1 carton = 45 lbs.; Texas, 1 carton = 42.5 lbs.

2/ Estimate for current year carried forward from earlier forecast.

3/ GRAPEFRUIT: Arizona and California, 1 carton = 33.5 lbs.;

Florida, 1 carton = 42.5 lbs.; Texas, 1 carton = 40 lbs.

4/ LEMONS: All, 1 carton = 38 lbs.

5/ TANGERINES: California and Arizona, 1 carton = 37.5 lbs.; Florida, 1 carton = 47.5 lbs.

6/ Includes tangelos, tangerines, and tangors.

7/ Varieties for 2001-02 include Robinson, Fallglo, Sunburst, Dancy, and Honey, but 2002-04 include Fallglo, Sunburst, and Honey.